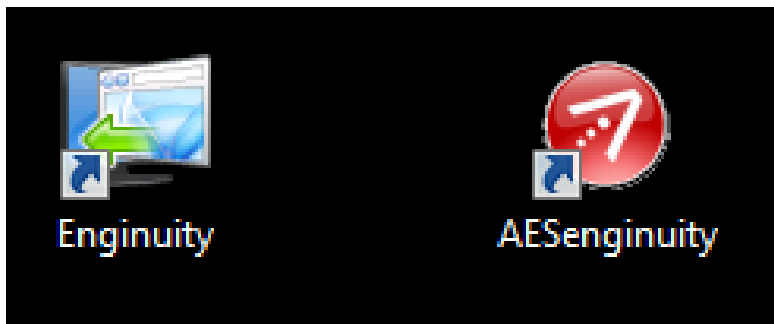


## New Icon

## Old Icon




## Log In Page



Adsystech Inc.

*Experience. Working for you.®*

 Login


User ID:

Password:

Site:

POP-UP BLOCKERS: The use of pop-up blockers may cause some information on this site to be blocked. We recommend that you disable all pop-up blockers when viewing this site.

SUPPORTED BROWSERS: Microsoft® Internet Explorer® 8.x or higher, Firefox 3.5.6, and Google Chrome 11 or higher.

 [Terms and Conditions](#)  
[Privacy Policy](#)

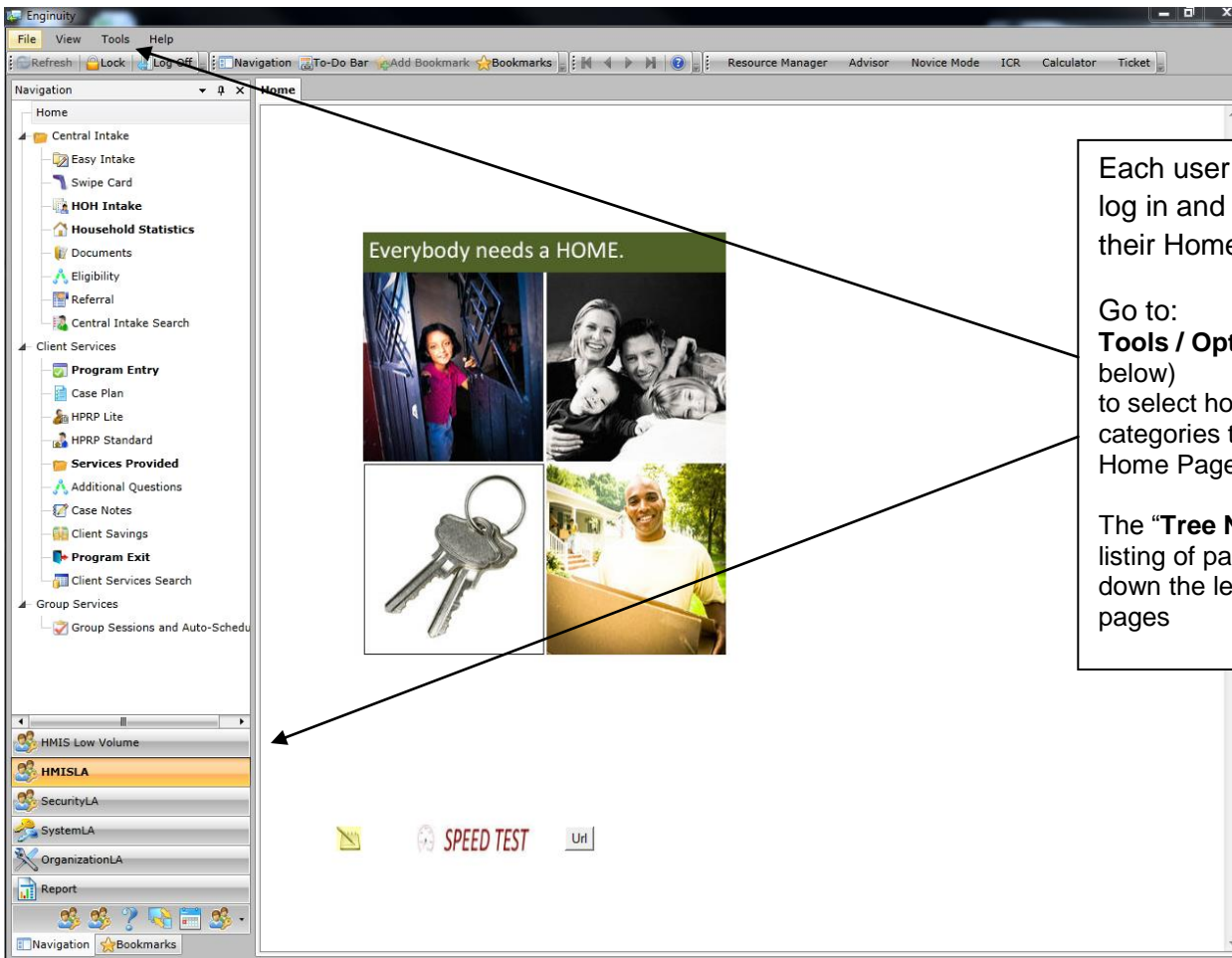


### ANNOUNCEMENTS

Adsystech is proud to announce the release of Adaptive Enterprise Solutions (AES) version 5. On this advanced platform you will find many new and exciting features. Please review the updated training materials available on the Adsystech Administrator SharePoint site (<http://enginuity33.esserver.com/AESadministrators>). The SharePoint contains updated user guides on the enterprise modules available to ALL customers at no additional cost. Additionally, to assist our user community in their efforts, we have granted access to videos, report information, and supplementary content on the site. If you do not have access to the SharePoint, please contact your system administrator for credentials.

- **AESuniversity FREE Webinars** are provided each month. Sign up to learn from Adsystech professionals how to get the most out of the AES modules. (See the calendar section for details) <http://enginuity33.esserver.com/AESadministrators>
- **AEScertifications** are available. Whether you're just starting the journey or well on the path of a successful social service information management (SSIM) professional career, AES certification in social service, delivery, administration and security, or data analysis, exams are FREE, to learn more please contact [certifications@adsystech.com](mailto:certifications@adsystech.com) to schedule an exam or click <http://www.Adsystech.com>. This is your chance for career enhancement, increased salary, and greater success in your chosen profession.
- **The HEARTH Act** requires Continuums of Care to design Coordinated Entry for services. Let Adsystech help with our new AESce module. Delivering services, providing waitlists, and referring clients for housing is just a few of the ways we can help. Contact an Adsystech representative for more information.

# New Home Page



Note the categories have been changed from example above:

- 1) 6 categories changed to 8
- 2) Order of categories changed

## Home Page Customization

**Enginuity - Options**

Initial Settings | General | Navigation Pane | Resource Manager | Messenger | Data Syn

Theme: Office\_Black

Initial Pane Visible: ☐ To-Do Bar

Initial Navigation Pane Width: 250 (between 200 and 400)

Initial To-Do Bar Width: 250 (between 200 and 400)

Apply Close

**Go to:**  
**Tools / Options / General**

to select how many categories to pin to the Home Page tree

**Tools / Options / Navigation Pane**

to order the categories using the 'Move Up' and 'Move Down' buttons

**Enginuity - Options**

Initial Settings | General | Navigation Pane | Resource Manager | Messenger | Data Syn

Maximum Navigation Buttons: 8

Reset Columns Order for All Grids

Reset Managed Message Boxes

Reset All to System Default

Apply Close

**Enginuity - Options**

Initial Settings | General | Navigation Pane | Resource Manager | Messenger | Data Syn

Display buttons in this order

- HMISLA
- Report
- SecuritySA
- SystemSA
- OrganizationSA
- Delete/ReOpen/MergeLA
- HMIS Low Volume
- eFactory
- HMISSA
- eFactorySA
- CSBGSA
- EncounterSA

Move Up

Move Down

Reset

Set Default

Apply Close

## Customizing Grids



All grids may be customized by moving the desired category to the place you choose. You then right click in the grid and choose "Save columns order"

# Data Organization in HMIS

## 1) Central Intake = Demographic Records

\* One record per client

- a) Demographic Data
- b) Income and Non-Cash Benefits

## 2) Client Services = Programmatic Records

\* as many records as required

- a) Program Entry
- b) Residence prior to entry
- c) Entry/Exit Questions (required questions are shaded in **PURPLE**)
- d) Services Provided
- e) Program Exit

## 3) Snapshots

\* see Snapshot inserts

- a) Taken automatically at program entry –and- exit

## 4) 3 Rules of Thumb

- a) Enter all HH members into Central Intake and assure that all data are correct (especially income and non-cash benefits) before **entering and exiting** Household members from program
- b) Enroll all Household members into program at same time – ALSO - Exit all Household members from program at the same time
- c) Answer program entry/exit questions for EACH Household member

Before initial client entry – go to [Client Intake Search](#) to insure client is not already in system

File View Tools Help

Refresh Lock Log Off Navigation To-Do Bar Add Bookmark Bookmarks Resource Manager Advisor Novice Mode ICR Calculator Ticket

Navigation

- Home
  - Central Intake
    - Easy Intake
    - Swipe Card
    - HOH Intake
    - Household Statistics
    - Documents
    - Eligibility
    - Referral
    - Central Intake Search
  - Client Services
    - Program Entry
    - Case Plan
    - HPRP Lite
    - HPRP Standard
    - Services Provided
      - Additional Questions
      - Case Notes
      - Client Savings
    - Program Exit
    - Client Services Search
  - Group Services
    - Group Sessions and Auto-Schedule

HMIS Low Volume

HMISLA

SecurityLA

SystemLA

OrganizationLA

Report

Navigation Bookmarks

Central Intake Search

Identifier SSN last 4 FirstName LastName DOB ID Search Clear

Phone # Phone Search

Jump to Page

Drag a column header and drop it here to group by that column

FirstName	LastName	ID	Identifier	BirthDate	HeadOfHouseHold	Last4SSN	HouseHoldID
-----------	----------	----	------------	-----------	-----------------	----------	-------------

Page 1 of 1 Total:0

**Initial Central Intake** page for **Head of Household** only – fill in all **PURPLE** shaded areas unless the client is a DV victim or has Refused Consent (see below) - Completion of white areas will increase data quality

**-Save-**

**\*\* DO NOT alter these two boxes!!**

The screenshot shows the Enginuity software interface. The main window is titled 'HOH Intake[ Sunny Day Sunny Day\_12/12/1982\_2470869]'. The form includes the following sections:

- Head of Household Check:** A dropdown menu with 'Sunny' selected.
- Consent:** A dropdown menu with 'Organization' selected.
- Consent Refused:** A checkbox that is checked.
- Personal Information:** Fields for SSN Code, First Name (Sunny), Middle (Day), Last Name (Day), Suffix, Date of Birth (12/12/1982), and DOB Code (Full DOB).
- Last Known Permanent Address:** Fields for Street #, Street Name, Street Type, Unit Type, Unit #, City (Olympia), County, State (WA), Zip (98501-), Zip Data Quality (Full), and Country.
- Preferred First Name, Preferred Last Name, Identifier (2470869), Email:**
- Phone, PH Type (Home Phc), Leave MSG, Phone No. Alt, PH Type (Home Phc), Leave MSG, Contact Preference (Work Phone):**
- Selected Clients:** A table with columns: FirstName, LastName, Suffix, BirthDate, BirthYear, HeadOfHouseHold, Last4SSN, County. The table contains one row for 'Sunny Day' with a birth date of 12/12/1982 and a checked 'HeadOfHouseHold' box.

A yellow callout points to the 'Head of Household Check' and 'Consent' dropdowns, stating: **\*\* DO NOT alter these two boxes!!**

The **Consent Refused** checkbox is for clients who refuse to sign a consent form or in cases such as domestic violence, sexual assault, dating violence, or stalking. Washington State law (**RCW 43.185C.180**) requires that service providers obtain written consent from homeless clients in order to enter personal identifiers (First and Last Name, Social Security number, full DOB, initials, last known permanent address or Zip Code) into HMIS.

### Client Rights

- 1) Clients have the right to refuse to provide personal information, or to stop an agency from entering their personal information into the HMIS.
- 2) Clients have the right to decide what personal information can be shared about the client and their household in HMIS, and who it can be shared with.
- 3) Clients have the right to change their mind about what personal information the agency has in the HMIS, what types of information they can share and who they can share it with. The agency must be notified in writing if a client changes their mind about consent settings. See the **Client Revocation of Consent** form.

## Household Statistics –

- 1) Fill in all **PURPLE** shaded areas for HoH first
- 2) Add Income and Non-Cash Benefits

**-Save-**

\* If there are no Income Sources put **“No Financial Resources”** **-Save-** - if no Non-Cash Benefits click the **“No”** box

The screenshot shows the Enginuity software interface. The main window is titled 'Household Statistics [ Sunny Day Sunny Day\_12/12/1982\_2470869 ]'. The interface includes a navigation pane on the left with categories like 'Home', 'Central Intake', 'HOH Intake', 'Household Statistics', 'Documents', 'Eligibility', 'Referral', 'Central Intake Search', 'Client Services', 'Program Entry', 'Case Plan', 'HPRP Lite', 'HPRP Standard', 'Services Provided', 'Additional Questions', 'Case Notes', 'Client Savings', 'Program Exit', 'Client Services Search', 'Group Services', 'Group Sessions and Auto-'. The main form area is divided into several sections:

- Household Name:** Sunny Day. A table shows income sources with columns: IND. (1), MONTHLY (0), GROSS (0), % POV. (0). Below the table are fields for First Name (Sunny), Last Name (Day), DateOfBirth (12/12/1982), BirthYear, and HeadOfHousehold (checked).
- Household Members:** Includes buttons for 'New', 'Save', and 'Same Family'. A 'Consent Refused' checkbox is present. Fields include Consent (Organization), Status (Alive), SSN/Code, First Name (Sunny), Middle Name, Last Name (Day), Suffix, Gender, DOB/Code (12/12/1982), Full DOB, Relation (Self), Residency Status, Disabled, Marital Status, Education Level, Ethnicity, Identifier (2470869), 1st Language, 2nd Language, Housing, and Interpreter Needed.
- Income in the last 30 days:** Includes buttons for 'New', 'Save', 'Delete', and 'Non-Cash'. Fields include Income Source, Stated Income, Pay Interval, Documentation, and Comments. There are also columns for 'IncomeSource' and 'StatedIncome'.
- Race [Choose As Many As Apply]:** Includes checkboxes for American Indian/Alaska Native, Asian, Black/African-American, Native Hawaiian/Pacific Islander, White, Don't Know, and Refused.

Arrows from the text instructions point to the 'Save' button in the Household Members section and the 'No' box in the Income in the last 30 days section.

## Income Sources –

It is possible that a client has multiple sources of income – or – even multiple sources of the same type of income. List as many income sources as necessary.

If a client has more than one source of the same income type (i.e. two part-time jobs as Earned Income) you will need to add the two sources together and enter the total. The pay interval would be the most common denominator.

## Income & Non-Cash Benefits

- 1) **Note income** – can be from as many sources as necessary - **Save**
- 2) **Note Non-Cash Benefits** – a non-cash benefit that affects all family members should be given to ALL family members. A benefit such as “State Children’s Health Ins” should be given only to the child it benefits - **Save**

**Income in the last 30 days**

New Save Delete Non-Cash

Income Source

Stated Income

Pay Interval

Documentation

Comments

IncomeSource	StatedIncome
>	

Pop up Box – Non-Cash Benefits

**Household**

**Non-Cash Benefits**

☐ No ☐ Don't Know ☐ Refused

☐ Food Stamps or Benefits Card ☐ WIC

☐ MEDICAID ☐ TANF Child Care ☐ TANF Transportation

☐ MEDICARE ☐ Other TANF-Funded Services

☐ State Children's Health Insurance ☐ Temporary Rental Assistance

☐ VA Medical Services ☐ Section 8 or Rental Assistance

Other

Save Close

## Notes:

There are different sections on the Household Statistics page that are not well defined. Please note that the section for **Household Members** is in a light gray shaded area (grid on bottom left) with the **Race** section just below it in a Purple shaded area.

–AND–

The **Income in the Last 30 Days** section is in a dark gray shaded area (grid on bottom right)

The total **Household income** is at the top of the Household Statistics page in a Dark purple shaded area.

The current –or- Active Client will be in the white tab area at the top of all working pages.

Navigation ... To-Do Bar ... Add Bookmark ... Bookmarks ... Resource Name

Household Statistics [ Sunny Day Sunny Day\_12/12/1982\_2478869 ]

Household Name	Sunny Day	IND.	MONTHLY	GROSS
		1	0	0

Jump to Pro Update Members New Household

FirstName Sunny LastName Day



### Additional Household members –

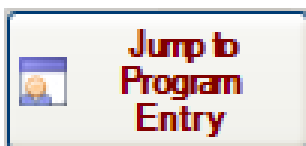
- 1) Click on “New” and repeat input of information into **PURPLE** boxes for **each** HH member
- 2) Click on “**Same Family**” to save **each** HH member before moving to the next HH member
- 3) Do not forget the Income & Non-Cash Benefits for **each** HH member - **Save in each grid**

### Notes:

Verify current –or– Active Client in the White Tab of all pages

You can verify combined HH income information in the **Purple ribbon** at the top of the page and total household members in the **orange** highlighted grid just below it.

**\*\* When all Household Statistics are completed for ALL members of a household**



**-OR-** you can now go directly to Program Entry by clicking on the **Tree Node** at the left side of the page

**Program Entry** – 1) Click on “Enter Program” -2) Select Program from drop down box - 3) Input Program Entry Date  
- 4) Click on **Continue**

The screenshot shows the 'Program Entry' form for 'Apple Pie Apple Pie 2435767'. The 'Entry' dialog box is open, showing the 'Program' dropdown set to 'ZTARapid Rehousing Program : Housef' and the 'Program Date' set to '4/1/2013'. The 'Continue' button is highlighted. The main form includes fields for 'First Name', 'Last Name', 'ID Number', 'Search', 'Clear', 'Enter Program', 'Bed Assignment', 'Homeless', 'Self Sufficiency', 'Consent', 'Case Manager', 'Program Entry Date', 'Prior Living Situation', 'Length Of Stay in Previous Place', 'Income', 'Individual Income', 'Level(%)', 'AMI', 'AMI Range', 'Entry Questions', 'Question', 'Answer', 'Comments', 'Previous', 'Next', 'Save', 'Copy', 'Refresh', and 'Required'.

-5) Select (✓) all HH Members to be enrolled  
- 6) Click **Select**

The 'Select Household Members' dialog box is shown, with the title 'Select Household Members' and a close button. The text 'Check All That Apply' is displayed above a list box containing one item: 'Apple Pie 2435767' with a checked checkbox. At the bottom, there are 'Select' and 'Cancel' buttons.

Answer: 1) Residence Prior to Program Entry 2) Length of Stay in Previous Place - 3) **Save**

Navigation: Home, Central Intake, Easy Intake, Swipe Card, HOH Intake, Household Statistics, Documents, Eligibility, Referral, Central Intake Search, Client Services, Program Entry, Case Plan, HPRP Lite, HPRP Standard, Services Provided, Additional Questions, Case Notes, Client Savings, Program Exit, Client Services Search, Group Services, Group Sessions and Auto-Schedule.

Program Entry[ZTARapid Rehousing Apple Pie Apple Pie 2435767]

First Name: [ ] Last Name: [ ] Identifier: [ ] Search: [ ] Customer: [ ]

Enter Program Bed Assignment Homeless Self Sufficiency Missing

ZTARapid Rehousing Program

Program Status: Enrolled

Comments: [ ]

Case Manager: ZTAJeniG

Program Entry Date: 4/1/2013

Prior Living Situation: Staying or living in a family me

Length Of Stay in Previous Place: More than one week, but less t

Monthly Household Income: 1720.00 Monthly Individual Income: 1720.00 Poverty Level(%): Missing AMI: Missing AMI Range: Missing

Entry Questions

Question	Answer
Compared to other people your age, would you say your health is excellent, very good, good, fair, or poor?	Very Good
What circumstances caused your homelessness?	Family Crisis
Have you been continuously homeless for a year or more?	No
How many episodes of homelessness have you experienced in the last 12 months?	Less than 4 episodes
Are you currently employed?	Yes
If currently working, number of hours worked per week?	20
Is work permanent, temporary, or seasonal?	
If the client is not currently employed, is the client currently in school or working on any degree?	No
Received vocational training or apprenticeship?	No

Previous Next Save

4) Answer Entry Questions for **ALL** HH members. Even Children. Move through questions by clicking Next or Previous

\*all required Entry Questions have **PURPLE Shaded ANSWER Boxes**

5) **Save**

\*\* Summary of all questions and answers will show in Entry Questions List

## Services Provided –

- 1) Click **New**
- 2) Click Activity drop down box and select a service
- 3) Input dates of service – for past due input the same date for both fields
- 4) Input amount paid
- 5) Input any notation for “paid to” or “explanation of payment”
- 6) **Save**

\*\* All HH members must have at least one service (can be an enrollment)

Navigation: Home, Central Intake, Easy Intake, HOH Intake, Household Statistics, Documents, Central Intake Search, Client Services, Program Entry, Case Plan, Services Provided, Additional Questions, Case Notes, Client Savings, Program Exit, Client Services Search, Group Services, Group Sessions and Auto-Schedule.

Services Provided [ZTARapid Rehousing Apple Pie Apple Pie 2435767]

First Name: A, Last Name: Pie, Identifier: , Search: , Customer: , Clear: , Home: , Filter: , Add: , Edit: , Delete: , Print: , Export: , Import: , Refresh: , Lock: , Log Off: , Navigation: , To-Do Bar: , Add Bookmark: , Bookmarks: , Resource Manager: , Advisor: , Novice Mode: , ICR: , Calculator: , Ticket: ,

Activity: Rent Assistance, Staff: ZTAJenIG, Date/Time: 4/1/2013 To 4/30/2013, Amount: 600.00, Cost: , Total: 600.00, Location: , Description: April Rent, Comments: ,

Activity	StartD	DateEnded	Description
Enrollment	4/1/2013		
Rent Assistance	4/1/2013	4/30/2013	April Rent

Move to Milestone: , Move: ,

For activities such as:

**Rent Assistance** – you will need to input a start and end date: 04/01/2013 to 04/30/2013

**Rent in Arrears** – you will input only the date you are attributing the service: 04/01/2013 to 04/01/2013

## Program Exit –

**\*\* Update Income and Non-Cash Benefits for Household in HH Statistics before beginning Exit**

- 1) Select the HoH - confirm the program being exited (dropdown box will have all programs enrolled)
- 2) Click on 'Begin Exiting Client Out of Program'

The screenshot shows the 'Program Exit' window for 'Apple Pie ZTARapid Rehousing'. A modal dialog box titled 'Select Household Members' is open, displaying a list of household members with 'Apple Pie 2435767' selected. The background form includes fields for 'Destination', 'Reason For Leaving', 'Destination Address', and 'Exit Program Questions'. A blue arrow points from the 'Begin Exiting Client Out of Program' button to the dialog box.

- 3) ( ✓ ) all Household Members exiting program – click **Select**

## Icons



Preview Entry Report



Shrink List To Current Household

The screenshot shows the 'Program Entry' window for 'Apple Pie ZTARapid Rehousing'. It includes fields for 'First Name', 'Last Name', 'Identifier', and 'Customer'. Below these fields are buttons for 'Enter Program', 'Bed Assignment', 'Homeless', 'Self Sufficiency', and 'Missing'. A blue arrow points from the 'Shrink List To Current Household' text to the house icon in the top right corner of the form.

Answer: 1) Destination

2) Reason For Leaving

Program Exit [ZTARapid Rehousing Apple Pie Apple Pie 2435767]

First Name: [ ] Last Name: [ ] Identifier: [ ] Search: [ ] Customer: Apple Pie\_ZTARapid Rehousing

Begin Exiting Client Out of Program Exit Client Out of Program Follow Up

Destination: Rental by client, no ongoing hous Reason For Leaving: Completed program Save / Change E

Destination Address Address: [ ] City: [ ] County: [ ] State: [ ] Zip: [ ] Country: USA

Email: [ ] Phone: [ ] Alt. Phone: [ ]

Edit Snapshot Monthly Household Income at Entry: 1720.00 Monthly Individual Income at Entry: 1720.00 Monthly Household Income at Exit: 1720.00 Monthly Individual Income at Exit: 1720.00 Self Sufficiency at Exit: Missing

Exit Program Questions

Question	Answer
Compared to other people your age, would you say your health is excellent, very good, good, fair, or poor?	Very Good
Housing Status	Stably housed
Are you currently employed?	Yes
If the client is not currently employed, is the	
If currently working, number of hours worked	
Is work permanent, temporary, or seasonal?	
Currently in school or working on any degree	No
Highest level of school completed	
Received vocational training or apprenticeship	
Do you have a developmental disability?	No
If you have a developmental disability: Have	

Previous Next Save

3) Answer all Exit Questions – required questions have **Purple shaded Answer boxes**. A summary of Exit Questions with answers will appear in the box next to questions. \*\*Answer questions for **ALL** Household members - **Copy** can be used if answers are the same as in Entry Questions. You will need to answer the Housing Status question **after** the copy.

4) **Save** - the system will let you know if you have missed a question. You can review all answers in the summary box.

5) Click on **Save** - at the top right of the page

6) (✓) Household members to exit - click **Select**

Select Household Members

Check All That Apply

✓ Apple Pie 2435767

Select Cancel

## 7) Click on 'Exit Client Out of Program'

**Program Exit[ZTARapid Rehousing Apple Pie Apple Pie 2435767]**

First Name: [ ] Last Name: [ ] Identifier: [ ] Search: [ ] Customer: Apple Pie\_ZTARapid Rehousing

Buttons: Begin Exiting Client Out of Program, Exit Client Out of Program, Follow Up

Destination: Rental by client, no ongoing hous Reason For Leaving: Completed program

Destination Address: Address: [ ] City: [ ] County: [ ] State: [ ] Zip: [ ] Country: USA

Email: [ ] Phone: [ ] Alt. Phone: [ ]

**Edit Snapshot**

Monthly Household Income at Entry	Monthly Individual Income at Entry	Monthly Household Income at Exit	Monthly Individual Income at Exit	Self Sufficiency at Exit
1720.00	1720.00	1720.00	1720.00	Missing

**Exit Program Questions**

Question	Answer
Compared to other people your age, would you say your health is excellent, very good, good, fair, or poor?	Very Good
Housing Status	Stably housed
Are you currently employed?	Yes
If the client is not currently employed, is the	
If currently working, number of hours worked	
Is work permanent, temporary, or seasonal?	
Currently in school or working on any degree	No
Highest level of school completed	
Received vocational training or apprenticeship	
Do you have a developmental disability?	No
If you have a developmental disability: Have	

Buttons: Previous, Next, Save

**Program Exit[ZTARapid Rehousing Apple Pie Apple Pie 2435767]**

First Name: [ ] Last Name: [ ] Identifier: [ ] Search: [ ] Customer: Apple Pie\_ZTARapid Rehousing

Buttons: Begin Exiting Client Out of Program, Exit Client Out of Program, Follow Up

Destination: Rental by client, no ongoing hous Reason For Leaving: Completed program

Destination Address: Address: [ ] City: [ ] County: [ ] State: [ ] Zip: [ ] Country: USA

Email: [ ] Phone: [ ] Alt. Phone: [ ]

**Edit Snapshot**

Monthly Household Income at Entry	Monthly Individual Income at Entry	Monthly Household Income at Exit	Monthly Individual Income at Exit	Self Sufficiency at Exit
1720.00	1720.00	1720.00	1720.00	Missing

**Exit Program Questions**

Question	Answer
Housing Status	Stably housed
Are you currently employed?	Yes
If the client is not currently employed, is the	
If currently working, number of hours worked	
Is work permanent, temporary, or seasonal?	
Currently in school or working on any degree	No
Highest level of school completed	
Received vocational training or apprenticeship	
Do you have a developmental disability?	No
If you have a developmental disability: Have	

Buttons: Previous, Next, Save

**Select Household Members**

Check All That Apply

- ☒ Apple Pie 2435767

Buttons: Select, Cancel

Make sure all exiting HH members are checked ( ✓ ) and click on

- Select



## 8) Enter date of Program Exit

FirstName	LastName	StartDate	DateEnded	Activity	ActivityType
Apple	Pie	4/10/2013	4/10/2013	Rent Assistance	Service
Apple	Pie	4/1/2013		Enrollment	Service
Apple	Pie	4/1/2013	4/30/2013	Rent Assistance	Service

The system will notify you if there are any outstanding services beyond the exit date. You can choose to cancel the exit and go back to identify services –or- choose to Exit Clients which will delete the outstanding services.

## 9) Exit Client(s)

10) Program Exit screen will “Gray Out” and no new information for that program enrollment can be entered

Question	Answer
Housing Status	Stably housed
Are you currently employed?	Yes
If currently working, number of hours worked	
Is work permanent, temporary, or seasonal?	
If the client is not currently employed, is the	
Currently in school or working on any degree	No
Highest level of school completed	
Received vocational training or apprenticeship	
Do you have a developmental disability?	No
If you have a developmental disability: Have	



## Additional Pages

**Central Intake Search** – you can search by any of the fields listed. Usually ID#, Identifier or Name

The screenshot shows the Enginity Central Intake Search interface. The search results table is as follows:

ID	Identifier	FirstName	LastName	HeadOfHouseHold	Last4SSN	County	BirthDate
2435767	2435767	Apple	Pie	<input checked="" type="checkbox"/>			1/1/1988

**Client Services Search** – you can search by any of the fields listed including Program and Active = Yes/No

The screenshot shows the Enginity Client Services Search interface. The search results table is as follows:

Active	Program	ProgramDate	Score	DateOfBirth	FirstName	LastName
Yes	ZTARapid Rehousing Program	4/1/2013		1/1/1988	Apple	Pie
No				1/1/1988	Apple	Pie

**Additional Questions** – To be filled out for all clients every 12 months of participation in a program

- **IYHP** clients have Additional Questions at Entry, every 12 months, Exit and are available for Follow Up (generally 6 months)
- **WFF** clients have Additional Questions at Entry and Exit

1) Click on **New**

2) Enter Date

### 3) Save

The screenshot displays the Engility software interface. The top menu bar includes File, View, Tools, and Help. Below it is a toolbar with various icons. The left sidebar shows a navigation tree with categories like Home, Central Intake, Client Services, and Group Services. The main window is titled 'Additional Questions[ZTA Rapid Rehousing Sunny Day 2470869]'. It features a form with fields for First Name, Last Name, Identifier, Search, and Custom. Below these are tabs for New, Save, and Delete. The 'Save' tab is active, showing fields for Consent (Organization), Prog Component (ZTA\_Rapid Rehousing), Milestone (Enroll), Activity (Additional Client Profile), Staff (ZTAJeniG), Start Date/Time, and Units. A table on the right shows 'Activity', 'ProgComponent', and 'MilestoneSta' with data for 'Additional Client Profile' and 'ZTA\_Rapid Rehousing'. At the bottom, there are sections for 'Client Profile: Questions' and 'Question'.

4) Answer all additional questions - A summary of Questions with answers will appear in the box next to questions.

The screenshot displays the HMIS Low Volume application interface. The left sidebar contains a navigation tree with categories like 'Home' and 'Client Services'. The main window is titled 'Additional Questions[ZTARapid Rehousing Sunny Day Sunny Day 2470869]'. It features a form for 'Profile Activity' with fields for personal information and service details. A table on the right lists activities. Below the form, there's a 'Client Profile Questions' section with a question about health comparison, an answer dropdown, and a comments field. The bottom status bar shows user information and form data.

### 5) Save

## Case Notes – not the same as the notes on the Household Statistics page

- 1) Click on **New**
- 2) Set Consent – can be set to private so only the person entering note sees it
- 3) Component - Click the dropdown box to select which open program the note is concerning
- 4) Activity - Click on the dropdown box to select activity associated with note (i.e. Case Notes).
  - a. Staff (Case Mgr) and Date with how much time spent on the activity can be noted
- 5) Add subject and body of note
- 6) **Save**
- 7) **Delete** – you can delete a note by highlighting the note in the grid and clicking Delete

The screenshot shows the Engenuity Case Notes form for a client named Peach Pie. The form is titled "Case Notes[ZTAShelter Voucher Peach Pie Peach Pie 2404884]". The left sidebar contains a navigation tree with categories like Home, Client Services, and Group Services. The main form area has several sections: a top section for client information (First Name, Last Name, Identifier, Search, Customer), a "Case Notes" section with a "New" button (callout 1), a "Consent" dropdown (callout 2), a "Component" dropdown (callout 3), an "Activity" dropdown (callout 4), a "Staff" dropdown (callout 5), a "Date" field (callout 6), and a "Units" field (callout 7). Below these is a large text area for the "Note". At the bottom, there is a "Milestones & Services" section with a "Milestone" dropdown (Enroll) and a "Services" dropdown (Alcohol Treatment Referral). The bottom status bar shows "FirstName: Peach | LastName: Pie | HOH: Yes | No Smart Form Data".